


Slide 1




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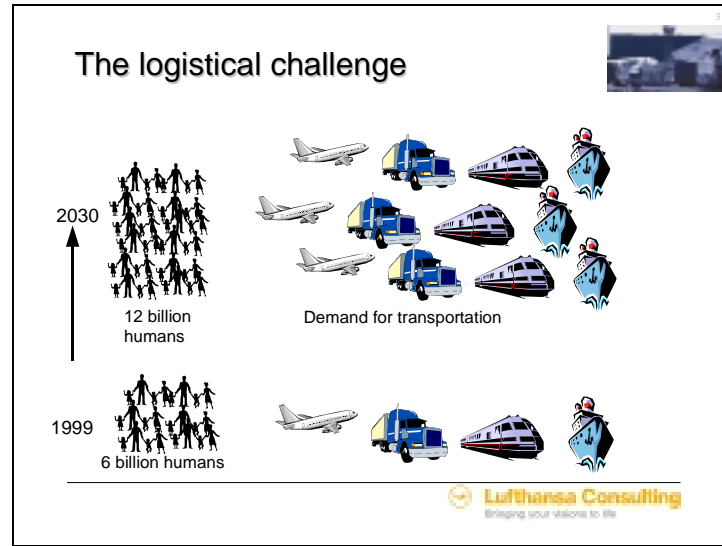
Topic

**Customer oriented Cargo Facilities-
requirements, drivers &
challenges**

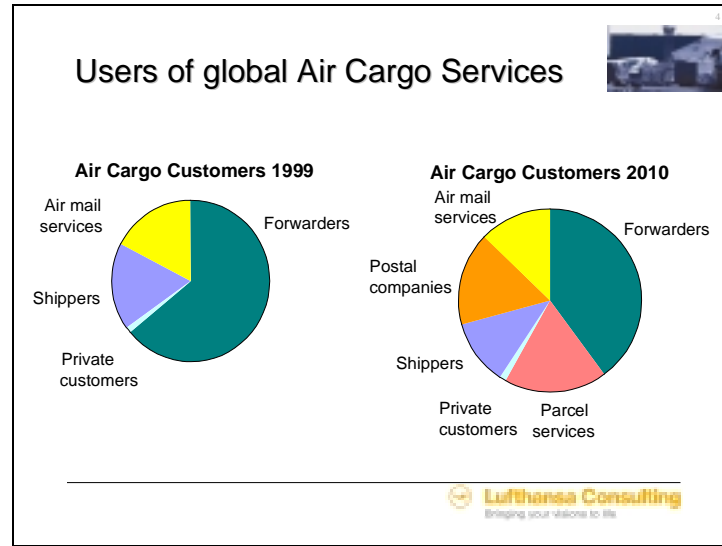


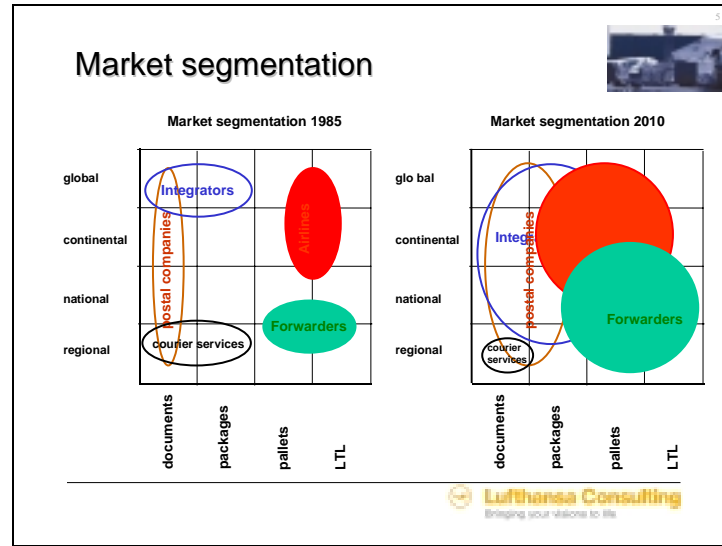
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Slide 3

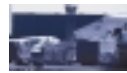


Slide 4

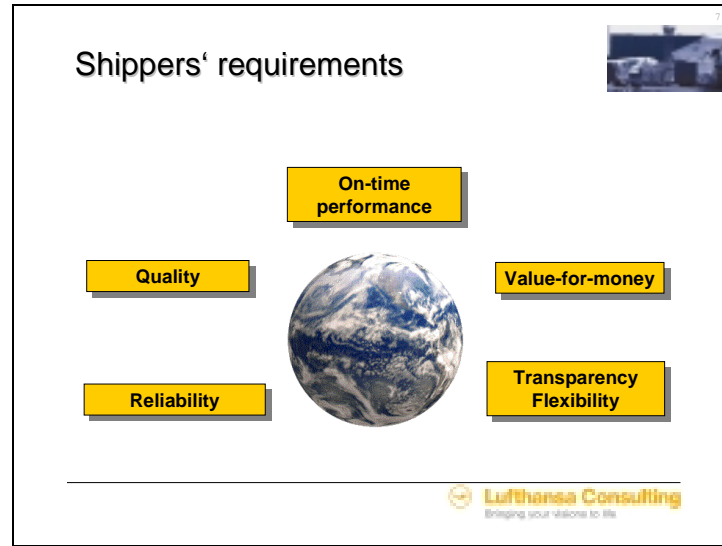




Shippers' market environment

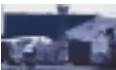


- Shorter product life cycle
- High market transparency and individualized customer demands
- Global sourcing and distribution
- Outsourcing of integrated logistics management
- Consolidation and multi-national conglomerates
- Shift of value adding production steps towards end of supply chain




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Shippers' requirements




- On-time performance
 - ✧ not just speed, but adherence to pre-defined time frames
 - ✧ time-definite services
- Quality
 - ✧ Same quality as Integrator services
 - ✧ reliable zero-defect performance
- Value-for-money
 - ✧ performance based contracts
 - ✧ lower rates even for premium products

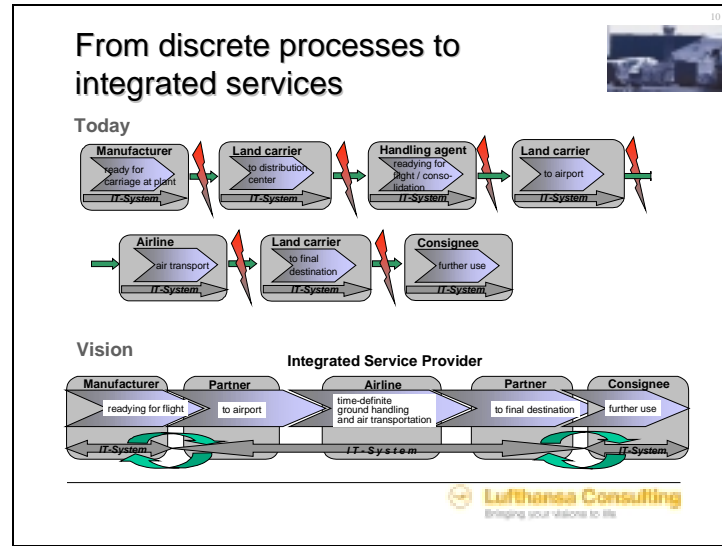
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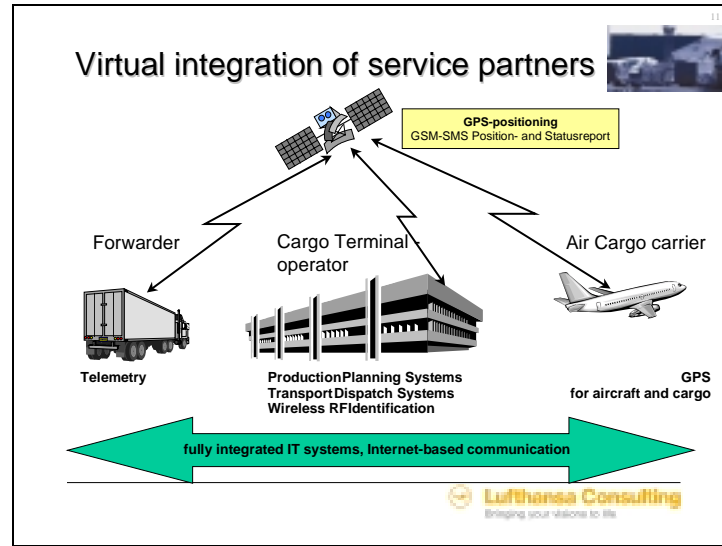
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Shippers' requirements

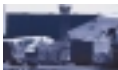
- Transparency
 - ◇ continuous supply chain status overview
 - ◇ open communication and information
 - ◇ cost transparency for planning purposes
- Flexibility
 - ◇ adapt to changing customer requirements
 - ◇ quickly and unbureaucratic

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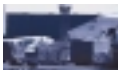


Fully integrated Information Technology

- Telemetry
 - ◇ truck guidance, ramp allocation
- Identification
 - ◇ fully automatic RF-tag reading for shipment and ULD tracking + status updates
- Paperless warehouse
 - ◇ electronic airway bills and mobile data terminals
- Resource management
 - ◇ optimized use of personnel and equipment based on pull principle
- Information and communication
 - ◇ internet access, pro-active information in case of irregularities


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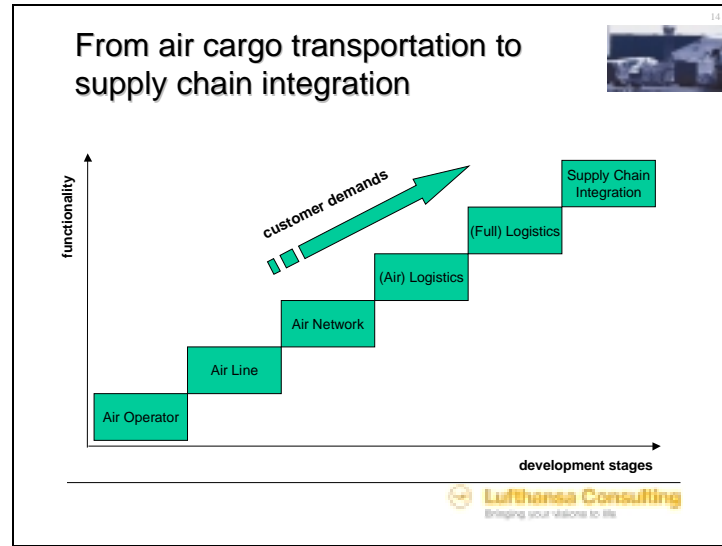
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Flexible mechanical equipment

- Workstations adjacent to truck loading ramp
 - ◇ short distances, minimization of internal transports
- Conveyors
 - ◇ only where better suited and cheaper than human labor
- Storage systems
 - ◇ automatic systems only where justified by volume
 - ◇ flow-related short time buffer only
- Mobile equipment
 - ◇ dispatch through resource management systems
- Sorting systems
 - ◇ at Hub Terminals for pieces up to 100 kgs
- Handling systems
 - ◇ robot technology for build-up and break-down

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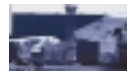


Organization and personnel



- From hierarchical organization to living and learning entity
 - ◇ awareness of responsibility for overall service performance
- Mental change
 - ◇ responsible logistics service professional instead of receiver of orders focused on physical labor
- Personnel qualifications
 - ◇ training for optimized use of equipment
 - ◇ active participation in continuous, customer focused improvement programs


Summary




- Doubling of freighter fleet until 2015
- Express and time-definite services fastest growing segments
- Further yield decline
- Global economy requires air cargo for efficient supply chains
- Network consolidation and expansion through alliances and mergers
- Vertically integrated forwarder / air cargo carrier partnerships offer true alternatives to Integrators

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Summary



- Transparency of information is precondition for market participation
- Organizations and their people are living and learning entities

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